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S-E-C-R-E-T

MEMORANDUM FOR: (HEAD OF CAREER SERVICE)

SUBJECT : Identification of Employees for Nomination as Participants
in the CIA Retirement and Disability System

REFERENCE : [REDACTED] (Proposed)

25X1A

1. On 2 March 1965 the Acting Director of Central Intelligence appointed the members of the CIA Retirement Board effective upon the approval of Head-
25X1A [REDACTED] CIA Retirement and Disability System, governs the administration of the System and establishes the CIA Retirement Board. The Board members have held __ meetings since 11 March 1965 for orientation as to the principles and standards of the System and the procedures and practices of its administration. As a result of such meetings, unanimity of understanding as to the duties and responsibilities of the Board has been achieved. Although for technical reasons [REDACTED] has not been 25X1A issued, it is the consensus of the Board members that the time has come to take the first major step in implementing the System. This first step will require action by your Career Service in identifying those employees who appear to meet the requirements for designation as participants in the System, and those who clearly do not.

2. The initial group of employees to be screened should logically be those who may have immediate eligibility for retirement if they otherwise qualify as participants in the new retirement system. Those employees who are already eligible for retirement under the Civil Service Retirement system in accordance with established Agency policy (i.e., age 60 with 30 years of service or age 62 with 5 years of service) should not, by virtue of that fact alone, be excluded from consideration under this program. Accordingly, there

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is attached a computer listing of those employees in your Career Service who by our records as of 31 December 1965 will be 50-years of age or older, have 20-years or more Federal service and 10-years or more Agency service. The listing also shows the total years and months of overseas service with the Agency which has been reported to the Office of Personnel and in turn to the Office of Computer Services. These figures are cumulative and represent past and current overseas service computed through 31 March 1965. A separate page is attached for each employee for whom overseas service has been recorded which shows detailed entries of completed TDY or PCS overseas service, and also the beginning date of current tours where known. While the accuracy of the periods of overseas service as reflected in either of the two documents has not been verified, the individual page provides a base from which to start. The Board has requested that in general, initial nominations be limited to those cases in which all, or proportionately all of the qualifying service has been "over-seas" service. This will facilitate prompt handling of these cases in contrast to those which will depend on a more precise definition of non-overseas service which may be qualifying. However, this is not intended to preclude Career Service Heads from submitting exceptional or urgent cases of the latter nature to the Board for review and appropriate action.

3. It is recognized that many of the employees named in the attached listing will clearly not meet the service criteria for nomination as participants in the System. Early identification and elimination of these employees from further processing is desirable. It is requested, therefore, that you redline the name of each employee who clearly does not meet the service criteria for designation as a participant in the System. One copy of such annotated listing should be returned to the CIA Retirement Staff in Room 6E-29 as soon as

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possible with a covering memorandum signed by you or your deputy acting in your behalf. Such memorandum should state that as a result of an appropriate review it appears that those employees whose names have been redlined clearly do not meet the service criteria specified in [REDACTED] for designation as 25X1A participants in the System. The CIA Retirement Staff will prepare a memorandum, or dispatch, notifying each of these employees of the determination that they do not qualify for designation as a participant in the System and of their right to appeal such determination to the Director. Such documents will be forwarded to appropriate officials of your Career Service for information and proper distribution.

4. In those instances in which it is determined that an employee meets the service criteria for designation as a participant in the System on the basis of qualifying service performed overseas, a Form 3100, Nomination and Designation of Participant, should be completed. Such forms, with supporting documentation where applicable, should be forwarded to the CIA Retirement Staff as soon as possible for appropriate processing. An ample supply of such forms will be provided to your Career Service in the near future.

5. In those cases where the nominee has reached the mandatory retirement age of 65 for grade GS-18 or above, or age 60 for GS-17 or below, or is approaching such ages, there should be attached to the Form 3100 a memorandum addressed to the undersigned and signed by you which clearly outlines the position of your Career Service with regard to requesting or not requesting an extension of the nominee's services beyond the mandatory retirement age in the event that the nominee is designated a participant in the System. As you know, extension of a participant's service beyond mandatory retirement age will

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require the approval of the Director of Central Intelligence.

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6. In its review of H. R. 8427, the Senate Armed Services Subcommittee included the criterion in the selection standards that an employee must sign a written undertaking obligating him to serve anywhere and at any time according to the Agency's needs. This criterion is likewise specified in [REDACTED] and an appropriate supply of Service Agreement forms will be provided to your Career Service shortly for this purpose. The Application for Membership in the Career Staff of the Central Intelligence Agency signed by many Agency employees prior to 1960 will be acceptable in lieu of a newly executed Service Agreement in those cases where the nominee has over 15 years of Agency service or is not available to sign such an Agreement. It follows, however, that a Service Agreement should be completed and forwarded together with Form 3100, Nomination and Designation of Participant, as indicated in paragraph 4 above, in behalf of those nominees located in the United States having less than 15 years of Agency service, or in those cases where there is no Application for Membership in the Career Staff of CIA of record. With regard to nominees stationed abroad for whom no Application for Membership in the Career Staff of CIA is available, it is suggested that you delay requesting a Service Agreement from their respective overseas Stations or Bases until such time that their designation as a participant in the System has been recommended by the CIA Retirement Board. Your Career Service will receive prompt notification of such cases, and pending receipt of the respective Service Agreements from overseas their cases would remain in suspense with the Executive Secretary of the CIA Retirement Board. Section 6 of Form 3100 should be appropriately marked to show the status of the Service Agreement.

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7. Your assistance in implementing the first phase of this program by forwarding your nominations to the CIA Retirement Staff as they are completed would be greatly appreciated. Any questions that you may have in connection with this program should be referred to Mr. [REDACTED] ^{25X1A} Executive Secretary of the CIA Retirement Board, telephone extension 6001.

Emmett D. Echols
Director of Personnel

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